



GLOBAL CITIES INITIATIVE

A JOINT PROJECT OF BROOKINGS AND JPMORGAN CHASE

EXPORT PLANNING

CHAMPIONING YOUR METRO EXPORT INITIATIVE

Championing exports and the metro export plan is an important and ongoing process for regions seeking to enhance their global market presence. Metro areas embarking on an export planning initiative should methodologically approach buy-in, engagement and awareness for the overall initiative and among leaders and local stakeholders.

Gaining stakeholder support requires an outreach and communications strategy with three objectives:

- **Clarifying the Rationale for Exports:** Shifting the conversation in the metro area economic development community to recognize exports and global fluency as key components of job and economic growth
- **Gaining Buy-In and Support:** Promoting engagement and support from partner organizations and private businesses in the planning process to win champions that may ultimately engage in and fund planning and implementation efforts
- **Positioning the Export Plan as a Mechanism for Change:** Positioning the planning effort as a clear initial shift in how the region approaches and addresses its role in the global economy

Though championing exports and global engagement will likely be an ongoing process for any metro area that develops an export plan, this guide focuses on the three stages of export planning:

- Start up and market assessment
- Developing the plan and strategies
- Launch of the plan and implementation

Twelve regions from across the United States have participated in this effort with an additional eight currently developing plans. The experiences of these metro areas, including successful approaches and recurring challenges in the planning process, inform this guide and its recommendations.

To date, 20 metropolitan areas, representing 19 percent of the nation's population, 19 percent of overall employment, and 21 percent of GDP, have completed or are in the process of developing export plans.

The plan to champion exports and the planning process need not be developed as a standalone document for public release. It should function primarily as an internal guide for local public relations, external communications, and media relations. Many metropolitan areas have developed communications committees to develop and act on the recommendations provided in this guide; however, communications and championing support can also be provided by a well-resourced communications department or press office of a core team member.

For further information, examples, and tools, consult the [Global Cities Exchange](#) web page, which contains materials such as survey templates, interview forms, example policy memos, current metropolitan export plans, and links to data resources.

Following are the specific phases of the planning process.

PHASE 1 – START UP AND MARKET ASSESSMENT (MONTHS 1 - 5)

ENGAGEMENT OBJECTIVES:

- Establish a basic public understanding that the community is engaging in an export planning process and/or has been chosen to participate in the Global Cities Exchange, a part of the Global Cities Initiative, a joint project of Brookings and JPMorgan Chase
- Position exporting and global engagement as an important way to strengthen and grow jobs in a community
- Drive businesses to take the export survey
- Engage key stakeholders and supporters on the core team and the steering committee

IDEA BOX

Economic development officials, political leaders, and businesses from regions that have completed an export plan can be powerful champions in your local community to explain the benefits of the process. Consider tapping their expertise to help support your own messaging.

RECOMMENDED ACTIVITIES:

1. Small group and one-on-one briefings with key stakeholder groups, public officials, and the media
2. Targeted media strategy
 - a. Develop a task force of core team or steering committee members to manage communications throughout the entire planning process (see the [Ten Steps to Developing a Successful Metro Export Plan](#) for guidance on how to convene a core team and steering committee).
 - b. Conduct informational media briefings starting when the metro confirms its intention to pursue an export plan and/or its participation in the Global Cities Exchange, and when it launches its market assessment. The intent is to keep local media apprised, from the outset, of the project and what to expect going forward in terms of newsworthy events and expected outcomes.
 - c. Consider running brief Op-Eds in local business journals and other media sources. For those metros in the Global Cities Exchange, draft Op-Eds should be approved by Brookings before distribution.
3. Newsletter articles/blast emails to targeted lists

OBSTACLES TO WATCH OUT FOR:

Resist the temptation to jump out at the start of the process with a major public launch. This has not proven to be effective with Exchange metros, and in fact, can be counter-productive. A preferred approach, in most cases, is one that is methodical and focuses on making the case for exports in increments. The market assessment can take a long time (four to six months) to complete and waiting for its release to make public statements can better ensure key decision makers are in agreement once the actual brainstorming portion of the project starts. They are then able to come up with strategies to address exports and global engagement that map directly to the key findings of the market assessment. Members of the core team and local leaders are also able to speak with one voice once the key findings of the market assessment are presented. Further, many companies will often want to become involved and they may perceive that the process is floundering if there are not immediate opportunities to engage or if the process appears to take a long time to complete.

METRO EXAMPLE **SAN DIEGO**

The leaders of the San Diego metro export initiative recognized early on in the process that they wanted to establish themselves as knowledgeable about their metro's export economy before taking the initiative public. To do this, the San Diego core team conducted the majority of the market assessment before directly engaging the steering committee in any planning work. They used the assessment process not only to determine the key findings for exports in the region but also as a way to identify strong firms that could play a key role on the steering committee. After the completion of the market assessment, the core team conducted public presentations, engaged the media, and convened the first meetings of the steering committee. This was an effective approach as the steering committee immediately commenced thinking about solutions to the key findings and assessments. Further, the steering committee and community at-large did not feel the process had dragged on, because the five-month market assessment phase was done before engagement or large-scale publicity.

PHASE 2 – DEVELOPING THE PLAN AND STRATEGIES (MONTHS 4-7)

ENGAGEMENT OBJECTIVES:

- Communicate key findings from the market assessment
- Establish a baseline understanding of what is needed to grow exports in the region
- Engage a broader spectrum of key supporters
- Begin developing and testing potential strategies

RECOMMENDED ACTIVITIES:

1. Larger group briefings and presentations
2. One-on-one briefings with key stakeholders to discuss findings and next steps
3. Targeted media strategy to communicate findings
4. Newsletter articles/blast emails
5. Launch of simple web pages/microsites with information on key findings

OBSTACLES TO WATCH OUT FOR:

While the strategy development phase does not typically take as long as the market assessment, it is often equally, if not more, challenging to get the steering committee to agree on what to do about the findings. If the steering committee does not agree on the key challenges and opportunities facing the region, brainstorming on strategies could devolve. Stakeholders may then revert back to previous activities or focus only on industry sectors within partnering certain comfort zone. It is critical to drive agreement among the steering committee on the key findings and only then move forward, through facilitated conversations, on what the best approaches may be.

Further, the planning process should not move too far without ensuring high level officials and stakeholders are brought in as engaged supporters. Since many of the everyday staff on a planning project are often mid-level, they must make a concerted effort to ensure that the heads of their respective organizations are invested in the resulting plan as soon as the market assessment and a draft plan are developed. The buy-in and support of higher level leaders (including elected officials) are vital to ultimate success.

The market assessment process may identify partners or organizations critical to implementation of the strategies and recommendations of the export plan. As metros begin developing strategies and action plans, keep the steering committee and core team open to welcoming these new members that could be critical to the ultimate success of the plan.

IDEA BOX

The local public release phase of the market assessment represents an opportunity to have an outside voice lend support for the planning process. For Exchange metros, consider bringing a Global Cities Initiative representative out for presentations and briefings. For metros developing independent plans, consider featuring a representative from the U.S. Department of Commerce Initiative or other national groups engaged in exports/global trade.

IDEA BOX

This is the time to begin reaching a wider audience. For those participating in the Exchange, consider inviting a Brookings staff member to participate to public launches for keynote speeches, presentations, and media briefings to reinforce the message from an outside perspective. For metros developing export plans independently, representatives from the Department of Commerce or a governor's office could deliver keynote support messages.

METRO EXAMPLE PORTLAND, OR

In Portland, where key mid-level staff led the working effort, the committee convened a presentation of the export plan to top officials (including the Mayor of Portland) once the market assessment and an initial draft plan were completed. They conducted background interviews with media a few months before the scheduled plan release to inform the press about the initiative, educate them on basic findings and direction, and prepare them for the ultimate public release. By the time the plan was released in February 2012, the Portland export committee was able to schedule related media briefings and editorial board meetings with each of the major local news outlets with relative ease. Top economic and elected leaders championed the message and led the briefings. The export plan and release event attracted wide attendance and high-quality, on-message stories in major local media outlets.

METRO EXAMPLE MINNEAPOLIS-SAINT PAUL

The Minneapolis-Saint Paul export initiative approached the task of securing high-level champions for exporting by ensuring the highest ranking federal, state, and local officials in the metro area were committed participants of the export plan steering committee at the outset of the project. By having the head of the state trade office and the mayor of Minneapolis lead the planning effort, and commit to attending all meetings, they were able to convene the highest ranking officials from most of the involved organizations from day one. By the middle of the process, top leaders from throughout the region didn't have to be sold. Having been part of the planning process, and having heard the rationale for exports, they were committed to engaging in the effort early on and quickly became champions. GREATER MSP, the region's economic development partnership, was engaged from the start and ultimately agreed to helm the branding/marketing portion of the metro effort, in partnership with the Minnesota Trade Office.

PHASE 3 – LAUNCH OF THE PLAN AND INITIAL IMPLEMENTATION (MONTHS 7-12)

ENGAGEMENT OBJECTIVES:

- Create public plan visibility and understanding of its key components by stakeholders
- Identify and position the lead implementation organization
- Drive participation from a key group of businesses and champions to assist in plan implementation
- Establish the plan as a critical component of growing and sustaining the regional economy over the longer-term in the minds of the public, key stakeholders, potential funders, and other key plan champions

Use the exports plan as an entry point into greater global engagement and fluency

RECOMMENDED ACTIVITIES:

1. Regional presentations and keynote speeches
2. Broad regional strategy sharing through local op-eds and editorial board meetings (jointly with Brookings for Exchange metros, perhaps with the U.S. Department of Commerce leads for those metros pursuing their plans independently)
3. Enhancement of web pages with information clearly communicating what will be done to grow exports
4. Begin implementation in a phased approach and clarify what that approach will be

OBSTACLES TO WATCH OUT FOR:

The target audience and/or event for the export plan launch will vary by metro area. Some regions have found success presenting to very large audiences, while others determined it would be best to present to a smaller group of key business and other leaders. The launch not only can be used to drive a larger group of businesses to get engaged with the recommended strategies, it also offers the right moment to pivot towards implementing the plan in the eyes of the public. While metro areas might be eager to launch the plan as quickly as possible, many have indicated that they wish they would have been prepared for initial implementation of the programs and services recommended in the plan before its launch. This would have allowed the metros to be able to connect interested businesses immediately with programs and services after the launch of the plan.

METRO EXAMPLE SYRACUSE

In Syracuse, CenterState CEO, the regional economic development organization, launched the plan in front of a regional audience of 1,200 business people and stakeholders. While the group was successful in driving public awareness of the effort, it had not yet built the programs and services, or even an efficient intake strategy, for businesses interested in using its services. When launched, the group was inundated with requests for assistance and a desire to use services that CenterState was initially unable to provide. CenterState CEO has since positioned the Central New York International Business Alliance to be the key point of contact and provide direct counseling and assistance to businesses seeking export assistance.

METRO EXAMPLE SAN ANTONIO

San Antonio was very careful to have an organization in position to lead implementation before it publicly launched its export plan. As a result of the market assessment and strategy planning phases, the core team and steering committee identified the Free Trade Alliance of San Antonio (FTA), a local trade promotion alliance that promotes global business connections, as the organization to lead the export strategy implementation. Critically, key leaders in San Antonio recognized that export growth was an integral part of the community's on-going strategic planning process under the coordination of the San Antonio Economic Development Foundation (SAEDF). Through a series of planning discussions and the financial support from the city of San Antonio, the working group was able to position the Free Trade Alliance as the lead entity for export plan implementation. Moreover, as part of export strategy implementation, FTA was integrated into SAEDF's business retention and expansion program in order to coordinate export assistance to local companies. San Antonio credits the export planning process for helping it define the roles and responsibilities of its economic development actors in order to become more effective in its global economic development initiatives. Once these roles were defined, San Antonio was able to have a successful public launch of the export strategy that clearly positioned the Free Trade Alliance of San Antonio as the point of contact for any business looking to expand its international presence through exporting. ■

About the Metropolitan Policy Program at the Brookings Institution

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BROOKINGS

1775 Massachusetts Avenue, NW
Washington D.C. 20036-2188
telephone 202.797.6000
fax 202.797.6004
web site www.brookings.edu



Metropolitan Policy Program
at BROOKINGS

telephone 202.797.6139
fax 202.797.2965
web site www.brookings.edu/metro



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